

1/18



FOOT" 6922860

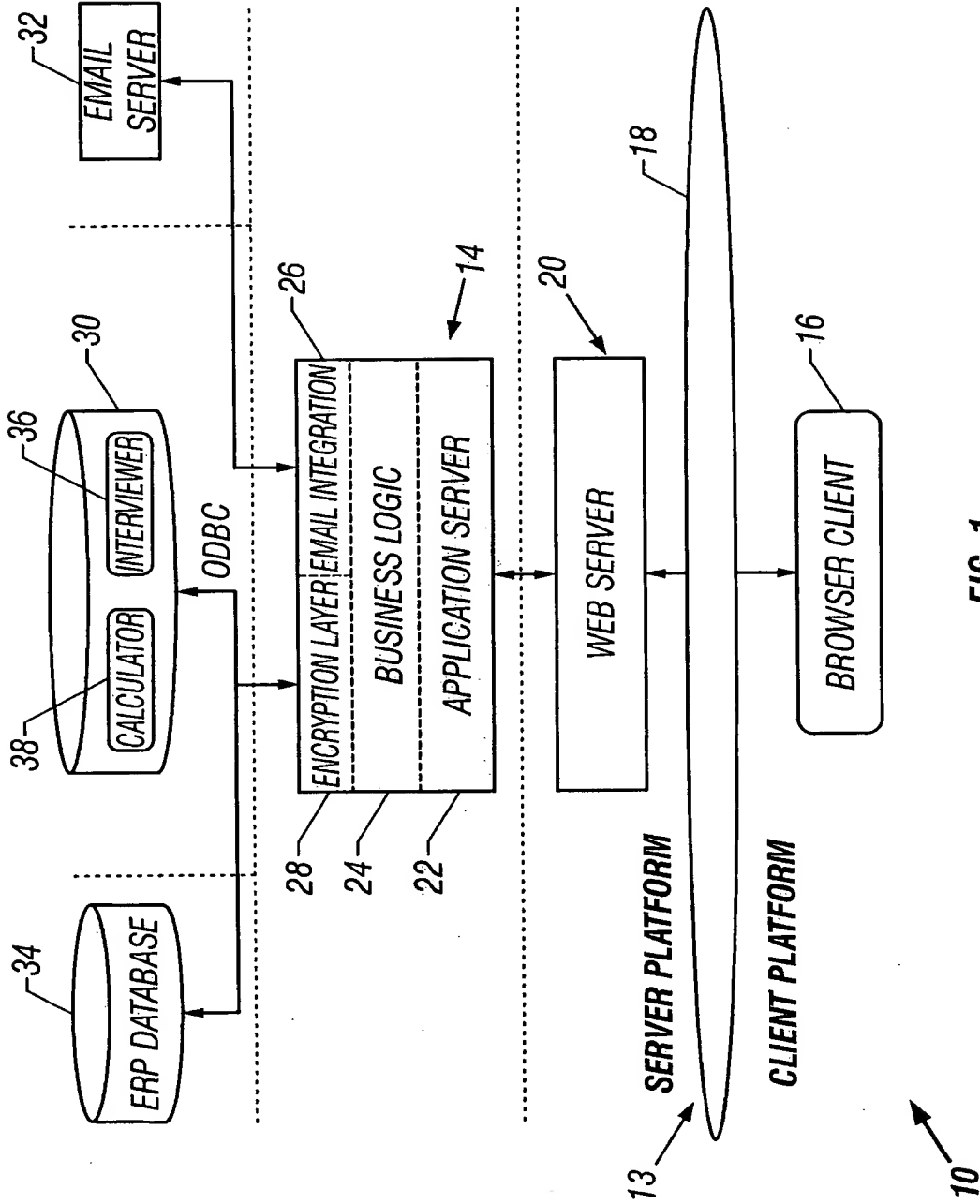


FIG. 1



2/18

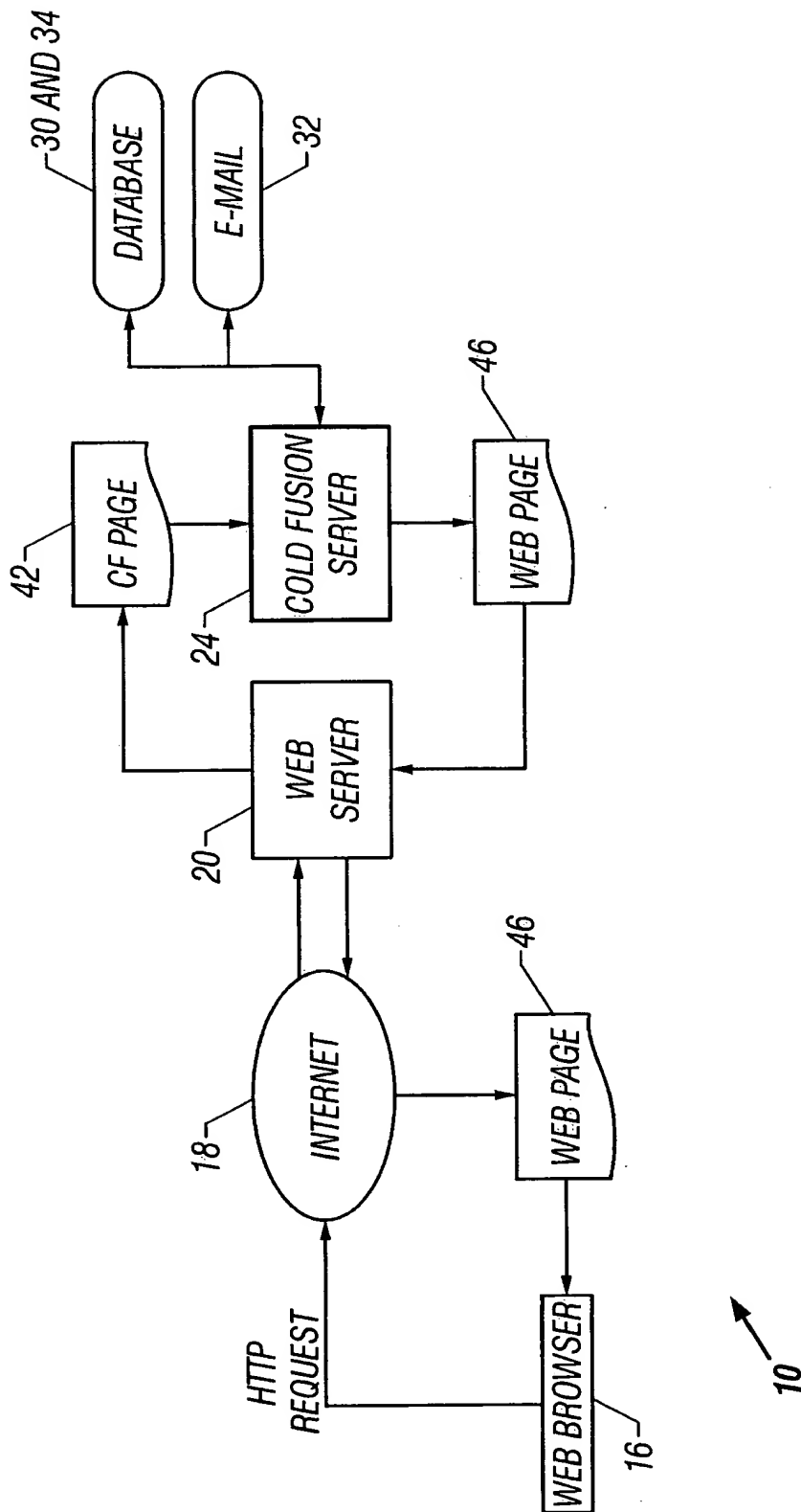


FIG. 2

FOOT-69F2860

3/18

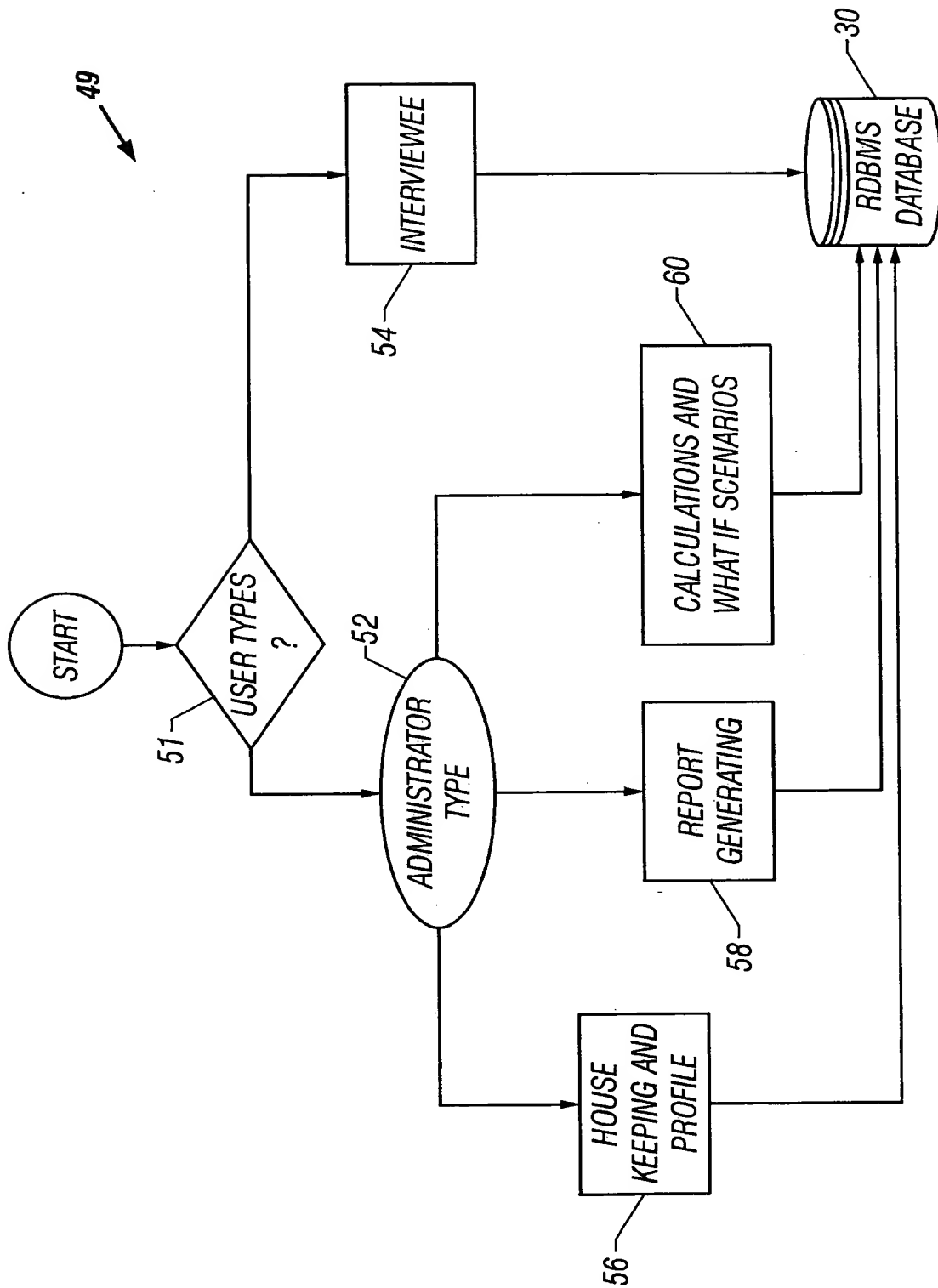


FIG. 3

FIG. 3



4/18

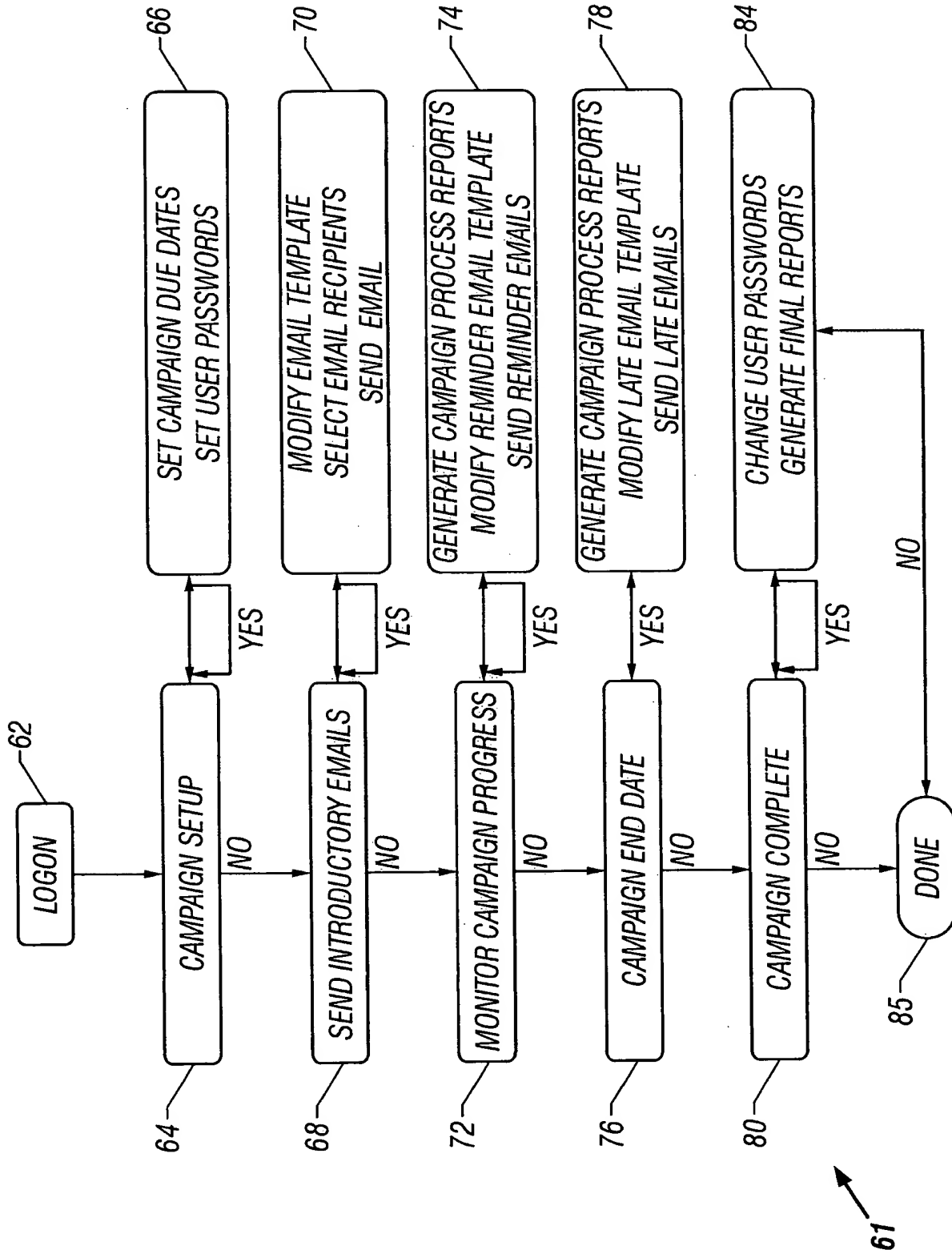


FIG. 4

5/18



FOOT" 69722860

File Edit View Favorites Tools Help 88		90	Address Links
Current Company Is <b>Planitax</b>		Current Year Is <b>2000</b>	
Select Name <b>Planitax</b> 92	Select Year <b>2000</b> 98	Add Year 94	
Update 96			
Current Department Is "Default Department" Number of employees in all departments is 112			
Select Department <b>100-10-Default Department (3)</b> 100			
ID: <input type="text"/>			
Add New Department 104			
Employees: Displaying 20 Employees Starting From 1, Number Of Employees In Department Is 3			
<b>20</b> Number Of Displayed Employees	Search <input type="text"/> Go	<input checked="" type="checkbox"/> Limit Search To Selected Department Only Search Is Performed On Sorted Column Only	
FName L.Name Title (Password)		Review/ Send Delete Print	
A-133 OK Demo 68011	Demo Trainee - "Senior Administrator"		Plt / <input type="checkbox"/>
Done 106	112	108	110

FIG. 4A

6/18



File Edit View Favorites Tools Help		-114 < > Address Links >>	
Add Virtual Employees (Planitax inc. Direct Access)			
50	Add Now		
<b>Mailing System:</b> <ul style="list-style-type: none"> <li><input type="radio"/> Send Introduction Email For Interview Campaign To Selected <b>Managers Only (Two Parts)</b></li> <li><input type="radio"/> Send Introduction Email For Interview Campaign To All <b>Employees With Email (Two Parts)</b></li> <li><input type="radio"/> Send Reminder Email #1 To Selected <b>Managers Who Haven't Submitted The Interviewer Yet</b> —116</li> <li><input type="radio"/> Send Reminder Email #1 To All <b>Employees Who Haven't Submitted A Questionnaire Yet</b></li> <li><input type="radio"/> Send Reminder Email #2 To Selected <b>Managers Who Haven't Submitted The Interviewer Yet</b></li> <li><input type="radio"/> Send Reminder Email #2 To All <b>Employees Who Haven't Submitted A Questionnaire Yet</b></li> <li><input type="radio"/> Send Late Notice Email To Selected <b>Manager Who Haven't Submitted The Interviewer On Time</b></li> <li><input type="radio"/> Send Late Notice Email To All <b>Employees Who Haven't Submitted The Interviewer On Time</b></li> </ul> <p>Send A Hidden Copy Of Every E-mail To: <input type="text"/></p> <p>(Leave Blank If You Don't Want To Send Hidden Copy)</p> <p><input type="checkbox"/> Apply Only To Selected Department</p> <p><input type="checkbox"/> Send Summary E-mail To From Address</p>			
Done			

FIG. 4B



**FIG. 4C**

**FIG. 4C**

8/18



HTML Report - Submitted Questionnaires

File Edit View Favorites Tools Help

Address Links

ADMINISTRATOR'S ACCESS

Tracking Reports Submitted By Managers

126

☐ Submitted Questionnaires

☐ Not Submitted Questionnaires

☐ Submitted Questionnaires Between Dates

From:

Month

1

/

Day

1

/

Year

2000

To:

Month

12

/

Day

31

/

Year

2000

128

☒ Average R&D Percentages By Department

☐ R&D Percentages By State-Detail Report

☐ R&D Percentages By Department-Detail Report

☒ Print Each Unit On Different Page

SHOW REPORT

SHOW REPORT IN A NEW WINDOW

FIG. 4D





9/18

HTML Report - Submitted Questionnaires

File

Edit

View

Favorites

Tools

Help

Address

Links

WorldWide Financial Corp.

R&D Tax Credit - Summary Reports

Average R&D Percentages By Department

Calendar Year: 2000

GO BACK

Department	Department Name:	No. Of Quest For Dept	Average R&D%
100-10	Default Department	3	60
100-1001	Architecture & Validation	11	59
100-1002	XYZ Development Team	14	48
100-1006	PC Firmware	13	77
100-1007	PC GM	21	0
100-1011	R&D SW 1	9	17
100-1014	S/W Localization	17	0
100-1015	System Interfaces	10	49
100-1016	Software Validation	8	100
100-1018	PRX Hardware	8	26
Summary: 11 Department			

GO BACK

FIG. 4E

FOOT" 69T24960

10/18



File Edit View Favorites Tools Help						
			Address Links			
R&D Questionnaire Detail Report By State Calendar Year: 2000 State: CA						
Employee Name	Title	Dept.	Num.	Research	Superv.	Support R&D Neg R&D
Melanie	2 Camberlango Tester	0	0	0	0	100
CA	Average	0	0	0	0.0	100.0
State: CA Average All Department						
		0	0	0	0.0	100.0

FIG. 4F-1

FOOT" 6922860



11/18

State: CA								
Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D
Demo200	Engineer	100-10	50	50	0	0	100	0
Paul Jordan	Manager	100-10	0	80	0	0	100	0
CA	Default Department		25	65	0	0	100.0	0.0
State: CA Average All department			25	65	0	0	100.0	0.0
State: CA								
Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D
Mick Botecelli	Vocals	100-10	0	0	0	0	0	100
CA	Default Department		0	0	0	0	0.0	100.0
Brenda McKenna	Sr. Engineer	100-1001	25	5	100	100	100	0
Christophe Rosen	Sr. Engineer	100-1001	0	4	54	58	58	42
David Jow	Sr. Engineer	100-1001	4	45	4	53	53	47
Marc Lindley	Engineer	100-1001	4	4	45	53	53	47
Matthew Baily	Engineer	100-1001	0	100	4	100	100	0
Paula Hung	Sr. Engineer	100-1001	2	8	36	46	46	54
Done								

FIG. 4F-2



12/18

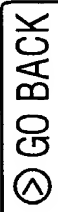


File Edit View Favorites Tools Help	
Address Links	
	
	
<b>R&amp;D Questionnaire Statues Report</b>	
<b>Submitted Questionnaires</b>	
Calendar Year: 2000	
Summary: 0 Managers	
	
Done	

FIG. 4G



13/18

129

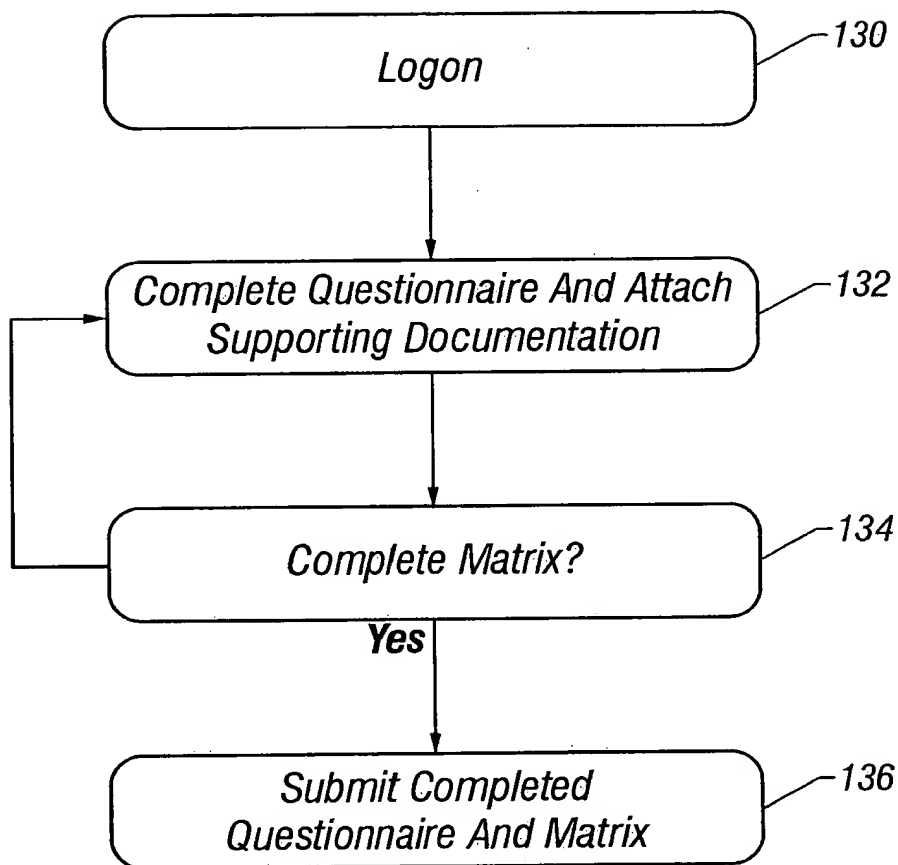


FIG. 5

14/18



File Edit View Favorites Tools Help		Address Links	
INSTRUCTIONS QUESTIONNAIRE DEFINITIONS FAQ HISTORY PRIZES SAMPLES HELP		148 QUESTIONNAIRE 150 Your Time For Submitting The Questionnaire Has Expired! 152 General Information 154 First Name: Paul 156 Middle Initial 158 Last Name: Jordan 160 E-mail: seda@planitax.com 162 Department #: 100-1006 164 Department Name: 100-1006-PC Firmware 168 Title: Manager	
Offered By PLANITAX		Part I: Research And Development Activities-In General To Qualify All Research And Development Activities Must Be Performed In The U.S. 1. Does Your Department Perform Only Direct Research And Development Activities? 144 <input type="radio"/> Yes <input checked="" type="radio"/> No If Yes, Go To Part II 2. Does Your Department Perform A Combination Of Direct Research And Development Activities And Direct Support Activities?	

FIG. 5A

**FIG. 5B**



16/18

**R&D Interviewer**

File Edit View Favorites Tools Help

MATRIX

MATRIX For Manager Brenda McKENNA

R&D Percentage:

Direct Research: 25 %

Direct Supervision: 5 %

Direct Support: 100 %

Total R&D %: 130 %

Total non R&D %: 0 %

Save

Warning!

○ A Red Number Signals That The Sum Of The R&D % For A Given Employee Is Greater Than 100%

GO BACK PROCEED

Offered By PLANITAX

FIG. 5C



**FIG. 5D**



18/18

R&D Interviewer - client's administrator access"

File Edit View Favorites Tools Help

Address Links

Main Administrator Access

Current Distributor Is Planitax 174

Selected Distributor: Planitax 174

New Distributor:

Distributor Administrators:

First Name	Last Name	E-mail	Username	Password
Igor	Grubar	igorgrubar@abc.com	James	htmima
Borut	Hrzenjak		Hrzia	htmipu
Seda	Taysi	sedataysi@abc.com	Seda	111
Lisa	Yap	lisa@abc.com	Lisa	Lisa123456
Mark	Cottam		Demo	Demo

New Administrator

Current Company Is ABC"

Select Company: ABC 178

New Company:

Company Logo: ABC 180

Company Name: ABC

Done

FIG. 6